Job Aid:

Organization Administrator: Maintain Approval Paths

This Job Aid shows how to:

- Create, manage and adjust approval paths in COMMBUYS.

Of Special Note:

Approval Paths are used to mirror employee authorizations/security roles, and they are entered into the system by the Organization Administrator (OA) after discussion with the Agency Chief Procurement Officer, Chief Fiscal Officer and COMMBUYS liaisons. Thought and structure must be developed or known to ensure approval paths are created properly. The OA has the ability to edit, add, or remove approval paths. When an OA assigns an approval path, he or she is able to choose to activate many filters or limits. These include boundaries on which departments/locations utilized the path. Additionally, the OA is able to define approval paths based on dollar, the product or service (UNSPSC codes), and the type of document itself.

Screenshot	Directions
	1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com/bso/) into the Browser. Log in using your Login ID and password.

Screenshot	Directions
	2. Select **Configure Approval Settings**.
	3. Click on **Maintain Agency Approval Type Sequence**
	4. This displays the **Approval Types** your organization currently can utilize. Approval Types are categories to support approval paths; they are not approval paths themselves. If you want to modify an existing approval type, you can make edits to the Description, Priority, and Status (unless approval paths are already created using this type)

Job **Aid:**

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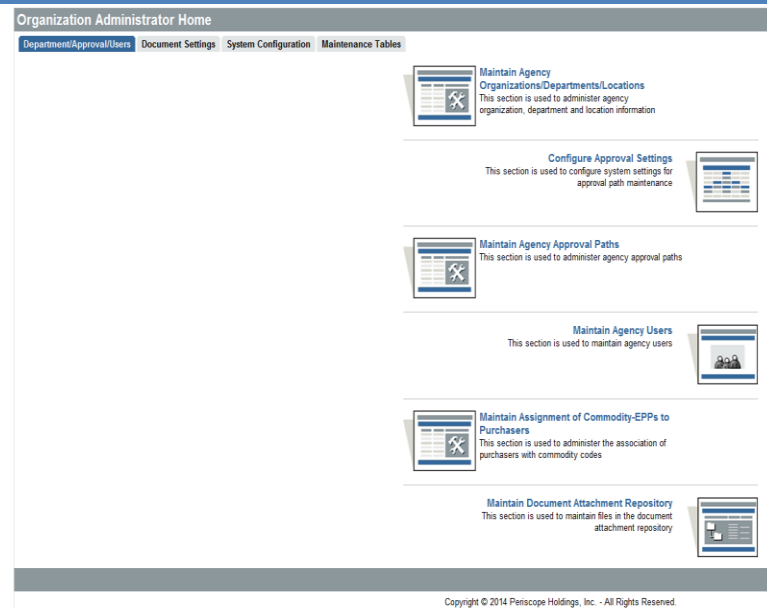| Screenshot	Directions
Maintain Organization Approval Types for: Operational Services Division Organization: 1080 - Operational Services Division | Approval Type ID	Description
new:	| | Priority	Status	Delete ☐
0	Active ▾			5. **Note:** This page is split into two images for ease of viewing. To enter a new approval type, enter a 5 digit alpha numeric unique identifier for the **Approval Type ID**. • For large organizations with many types of approvals, you may choose to use this identifier to represent a chronological path represented by using the three letter department (HR123) or (IT001). Name this path with a general **Description** of its purpose. It could be related to the individual type of purchase, or the level of authority needed to approve it. Assign this path a **Priority** from 1 to 99. • Remember that 1 is low priority and 99 the highest. • The system will route documents according to their given priority. An emergency purchase will have a high priority while office supplies will have a lower one. This path will be active by default unless you inactivate it if it is no longer in use. Click **Save & Continue** to save current path and add another, or **Save & Exit** to return to the previous screen.

Screenshot	Directions

Organization Administrator Home

Department/Approval/Users | Document Settings | System Configuration | Maintenance Tables

Maintain Agency Organizations/Departments/Locations
This section is used to administer agency organization, department and location information

Configure Approval Settings
This section is used to configure system settings for approval path maintenance

Maintain Agency Approval Paths
This section is used to administer agency approval paths

Maintain Agency Users
This section is used to maintain agency users

Maintain Assignment of Commodity-EPPs to Purchasers
This section is used to administer the association of purchasers with commodity codes

Maintain Document Attachment Repository
This section is used to maintain files in the document attachment repository

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6. Click on **Maintain Agency Approval Paths** from the Organization Administrator Homepage.

Approval Path Maintenance for: Organization DEF

Search Using: [ALL of the criteria ▼]

Search Fields:
- Approval Path ID [ ]   Approval Path Name [ ]
- Organization [▼]
- Department [▼] 🔍
- Location [▼]
- Approval Type [▼]
- Status [▼]   Access Role [▼]
- Document Type [▼]   Doc Sub Type [▼]
- Approver User [ ] 🔍

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

[Find It]   [Clear]

Path ID	Name	Organization	Approval Type	Dollar Range From	Dollar Range To	Status
BIT01	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$9,999,999,999.00	Active
BUD19	Budgetary Approval	2100 - Organization DEF	BUD17 - Budget Office Approval	$0.00	$50,000.00	Active
DTA13	POS	2100 - Organization DEF	SER35 - Services	$0.00	$50,000.00	Active
ED001	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$9,999,999,999.00	Active
ED002	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$99,999,999.00	Active
ED003	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$999,999.00	Active
ED004	Office Supplies	2100 - Organization DEF	LEVEL 1 - Supervisor	$0.00	$99,999,999.00	Active
ED006	Office Supplies	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$999,999.00	Active
ED008	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$9,999,999,999.00	Active
ED009	All other purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$99,999,999.00	Active
ED010	All other	2100 - Organization DEF	LEVEL 1 - Supervisor	$0.00	$999,999.99	Active
ED046	Office Supplies	2100 - Organization DEF	LEVEL 1 - Supervisor	$0.00	$9,999,999.00	Active
EXC	Exceptions	2100 - Organization DEF	BOF23 - Business Office	$25,000.00	$1,000,000.00	Inactive
EXC17	Exceptions	2100 - Organization DEF	BOF17 - Business Office	$25,000.00	$9,999,999,999.00	Inactive
EXC18	Exceptions	2100 - Organization DEF	EXC18 - Exceptions	$0.00	$50,000.00	Inactive
EXC22	Exceptions	2100 - Organization DEF	BOF22 - Business Office	$25,000.00	$1,000,000.00	Inactive
EXC24	Exceptions	2100 - Organization DEF	BOF24 - Business Office	$25,000.00	$999,999.00	Inactive
FRE17	Frequent Purchases	2100 - Organization DEF	SUP17 - Supervisor	$0.00	$499,999.00	Inactive
FRE18	Frequent Purchases	2100 - Organization DEF	MAN17 - Manager	$49,999.00	$9,999,999.00	Inactive
FRE22	Frequent Purchases	2100 - Organization DEF	SUP22 - Supervisor	$0.00	$49,999.00	Inactive
FRE221	Frequent purchases	2100 - Organization DEF	MAN22 - Manager	$0.00	$999,999.00	Inactive
FRE23	Frequent Purchases	2100 - Organization DEF	SUP23 - Supervisor	$0.00	$49,999.00	Inactive
FRE24	Frequent Purchases	2100 - Organization DEF	SUP24 - Supervisor	$0.00	$49,000.00	Inactive
FRE26	Frequent Purchases	2100 - Organization DEF	MAN24 - Manager	$0.00	$999,999.00	Inactive
FRE33	Frequent Purchases	2100 - Organization DEF	MAN23 - Manager	$49,999.00	$999,999.00	Inactive

1-25 of 83
1 2 3 4

[Add New Approval Path] [Global Approver Replace] [Exit]

7. When you click on the icon, you will see all the approval paths you currently have, both active and inactive.

- A Search box will appear if you have more than 25 approval paths to help locate paths in your organization. You may use any or all of the search criteria to find the approval path you would like to modify.

Edit to make changes to the pre-defined approval paths by clicking the **Path ID**
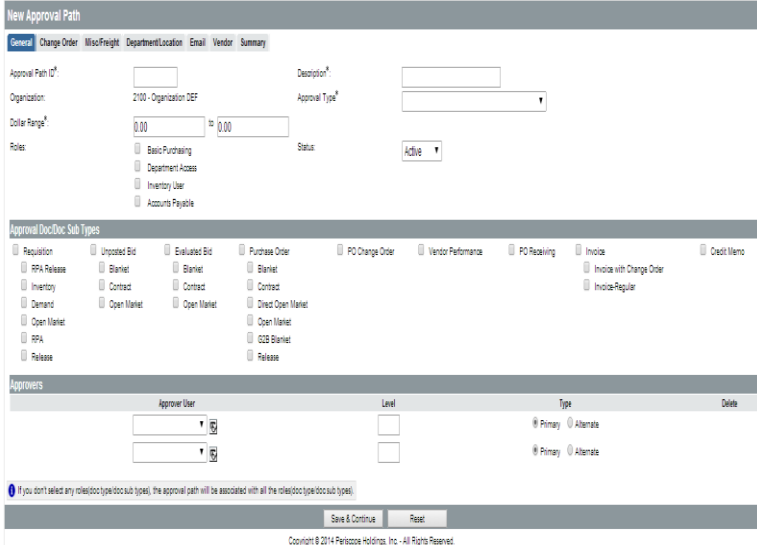
Or click the **Add New Approval Path** button at the bottom of the page to build a new path.

Global Approver Replace - . The Global Approver Replace function will replace the current approver with a new Approver <u>on all Approval Paths</u> where this user is named. Use eyeglass lookup icon to open the lookup search to find the appropriate user to select as the Global Approver. This would be used if an employee changed roles or is no longer using COMMBUYS.

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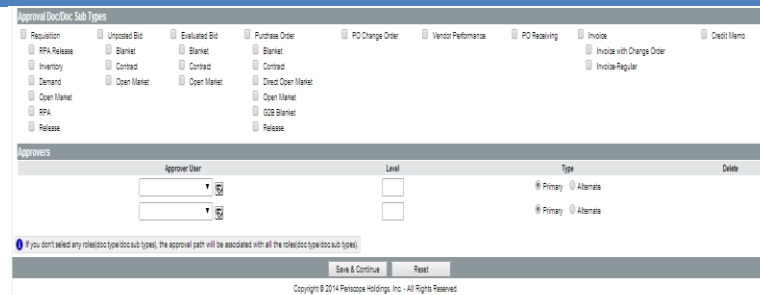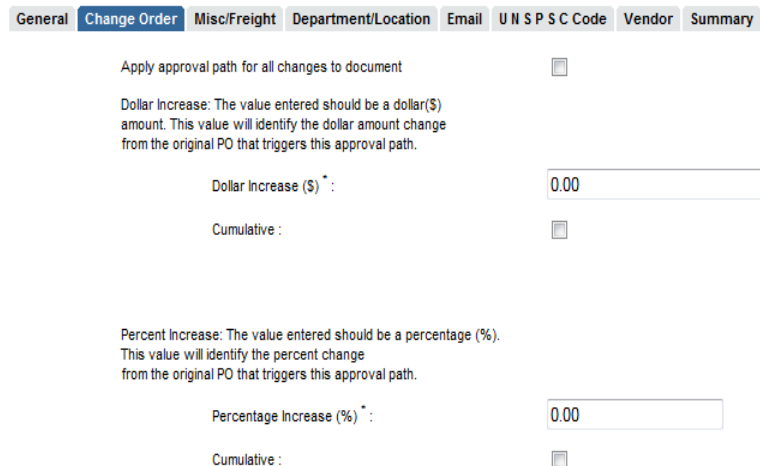| Screenshot	Directions

	8. Enter the required information and move through the tabs from left to right.
	
	Fill out the asterisked fields and click Save and Continue, then move to the next tab.
	
	General Tab:
	• **Approval Path ID** – a unique 5-digit alpha numeric ID related to the use of the path, for example if it is a path for a specific department, you may choose to utilize the first three characters of the department followed by a path #
	  ○ If you add more paths for this department, you may choose to use the same first three characters followed by an incremental number
	• **Description or Approval Path Name –** The path name reflects what kind of path this is. For example, using the HR Approval type referenced above, this path could be named Contract Employee Approval.
	• **Approval Type** – choose from the pull down menu of your previously entered Approval types
	• **Dollar Range** – required; to enable for all dollar amounts, set dollar range from 0.00 to 9,999,999,999,999.99 (the maximum amount allowed in COMMBUYS)
	• **Status** – Active/Inactive
	• **Roles** – designate this path to be used if a Basic Purchasing user and or Department Access user. NOTE: Leave the Inventory and Accounts Payable box unchecked for phase one.
	  ○ If no roles are selected, this approval path will apply to documents that meet the other criteria regardless of the role of the user who submitted it for approval
	
	Continued on next step…

Screenshot	Directions

9. General Tab Continued:

- **Approval Doc/Doc Sub Types** – select all of the types of documents that will apply to this path
  - If no document types are selected, the approval path will apply to all document types, as long as the other criteria of the path are met
- **Select Approvers** - Use the eyeglass box to search for the desired approvers
- **Level -** Level 1 is the first approver, and if additional levels are needed level 2 would be the second approver, and so on
- **Type -** A Primary approver means a required approver. An alternate approver, if chosen, will make the document available to both approvers so either one can approve for the document to move forward.
  - Only one alternate and one primary are allowed per level.

Click **Save & Continue**.

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10. Change Order tab:

You may set the approval path to be triggered for any change to the document. You may also enter the dollar total or percentage change.

Note: To access the Change Order tab, you must select the Change Order box under doc types in the previous screen in **Doc/Doc Sub Types**.

Screenshot	Directions

Approval Path ED008 - Software Purchases

General | Change Order | Misc/Freight | **Department/Location** | Email | U N S P S C Code | Vendor | Summary

Approval Path Department List

Department ID	Department Name
AN111	Animal Welfare

Approval Path Location List

Department ID	Department Name	Location ID	Location
There are no locations found for this approval path.			

Save & Continue | Add Depts/Locs | Delete All Depts/Locs | Reset

11. NOTE: **Misc. /Freight tab** – This applies only to Phase 2 invoicing functionality and will not be used in Phase 1 of the project

Department/Location tab:
* This tab allows you to choose the departments and locations this path will apply to
* If a department or location is not chosen, this path will apply to all departments

Select **Add Dept/Locs** and search for the department to add. You may also add locations here.

Approval Path COM01 - Search Departments/Locations

General | Change Order | Misc/Freight | **Department/Location** | Email | U N S P S C Code | Vendor | Summary

Search Using: ALL of the criteria ▼

Search Fields:
Department ID [ ] Department Name [ ]
Location ID [ ] Location Name [ ]

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Result Type: Department ▼

Find It | Clear

Select	Department ID	Department Name
☐	AOE02	Employee Relations
☐	BAA01	Environmental Quality
☐	CFA01	Land Surveying Board HR
☐	CHI01	Finance
☐	CHI02	Human Resources
☐	DAL02	ENERGY DEPARTMENT
☐	DTA01	Department of Transitional Assistance
☐	DYS88	Accounting Unit
☐	EH555	Budget
☐	KIP01	Office of Security
☐	MCB11	Fiscal Dept
☐	ORI01	Fiscal
☐	RWD03	Emergency Board
☐	VIP17	Commission for the Deaf

Save & Exit | Save & Continue | Cancel & Exit

12. Department and Location search appears.
* This is the information populated from clicking the **Find It** button.

Select the appropriate **Department ID** (which will select all locations within that department).

Or, click the **Department ID link** and select the desired locations within that department.

Then click **Save & Exit** to complete the new approval path, or click **Save & Continue** to select another Department ID.

Screenshot	Directions
Approval Path ED002 - Software Purchases General Change Order Misc/Freight **Department/Location** Email U N S P S C Code Vendor Summary **Approval Path Department List** | Department ID	Department Nan
BAA01	Environmental Quality
OB101	Old Boston	 **Approval Path Location List** 	Department ID	Department Name	Location ID
---	---	---
	There are no locations found for this approval path.		 [Save & Continue] [Add Depts/Locs] [Delete All Depts/Locs]	13. This is the screen view once the department has been added correctly.
General Change Order Misc/Freight Department/Location **Email** U N S P S C Code **Format email to be sent to the approvers for this path** ☑ Send Email ☐ Resend Email After [0] Days if Not Approved or Returned ☐ Customize Email Content **To** Next Approver **CC** 	User ID	User Name	Email	Delete
---	---	---	---
new: [____] 🔍			
new: [____] 🔍					14. **Email tab:** The default is checked to send an email to the approvers for this path. You have the ability to select the number of days you would like to send another reminder. You may select additional cc'd individuals within the COMMBUYS system, and you may also customize content of the email. • **Customize Email Content** – check to activate the remaining customization fields on the page • **To/CC/BCC** – select additional registered users within your organization that you would like to carbon copy or blind carbon copy on the email. Note: This does not give those additional email recipients the ability to approve or disapprove a document.
on **Email** **U N S P S C Code** **Vendor** **Summary** roval path, therefore the approval path is considered to be associ [Add U N S P S C Segment-Family/Class] opyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	15. **UNSPSC Code tab:** If you would like to have only certain UNSPSC codes go through its own approval path, click "Allow UNSPSC Code Approval" and select the codes. A path that has this feature enabled applies to all departments in the organization. Meaning that, if you create an approval path based on a Department/Location, you should <u>not</u> also add UNSPSC Code to that path. NOTE: **Vendor tab:** This tab only becomes active when the Credit Memo option is selected on the General tab, and this will not be used in Phase 1.

Screenshot	Directions

Approval Path ED002 - Software Purchases

General | Change Order | Misc/Freight | Department/Location | Email | U N S P S C Code | Vendor | Summary

General Information

Approval Path ID:	ED002	**Description:**	Software Purchases
Approval Type:	LEVEL 10 - Manager	**Dollar Range:**	$0.00 to $99,999,999.0
Status:	Active		
Send Email:	Yes	**Customize Email Content:**	No
Doc Types (Doc Sub Types):	Requisition (RPA Release , Open Market , RPA , Release) Unposted Bid (Blanket , Contract) Evaluated Bid (Blanket) Purchase Order (Blanket , Contract , Open Market , G2B Blanket , Release) PO Change Order Credit Memo		

Approvers

Approver User	Level
Richelle Waterman	1
Valerie Plante	2

16. **Summary tab:** View all of the criteria entered for this path. If you need to create another very similar approval path, you can use the "Clone Approval Path" button on the bottom of the page to create and edit a copy of the approval path you are currently viewing.

The path does not require submission, and is active, unless otherwise changed.

If you have chosen to clone the approval path all original information will populate in the new path. Navigate through the tabs (shown above) to customize the path.